

Declaration under section 197A(1) and section 197A(1A) to be made by an individual or a person
(not being a company or firm) claiming certain incomes without deduction of tax

PART I

1. Name of Assessee (Declarant)		2. PAN of the Assessee ¹		
3. Status ²	4. Previous year (P.Y.) ³ (for which declaration is being made) 2025-26		5. Residential Status ⁴	
6. Flat/Door/Block No.	7. Name of Premises	8. Road/Street/Lane	9. Area/Locality	
10. Town/City/District	11. State	12. PIN	13. Email	
14. Telephone No. (with STD Code) and Mobile No.		15 (a) Whether assessed to tax under the Income-tax Act, 1961 ⁵ : <input type="checkbox"/> Yes <input type="checkbox"/> No (b) If yes, latest assessment year for which assessed		
16. Estimated income for which this declaration is made		17. Estimated total income of the P.Y. 2025-2026 in which income mentioned in column 16 to be included ⁶		
18. Details of Form No. 15G other than this form filed during the previous year, if any ⁷				
Total No. of Form No. 15G filed		Aggregate amount of income for which Form No.15G filed		
19. Details of income for which the declaration is filed				
Sl. No.	Folio number ⁸	Nature of income	Section under which tax is deductible	Amount of income
		Dividend from Units of Mutual Fund	194K	

Signature of the Declarant⁹

Declaration/Verification¹⁰

*I/We..... do hereby declare that to the best of *my/our knowledge and belief what is stated above is correct, complete and is truly stated. *I/We declare that the incomes referred to in this form are not includible in the total income of any other person under sections 60 to 64 of the Income-tax Act, 1961. *I/We further declare that the tax *on my/our estimated total income including *income/incomes referred to in column 16 *and aggregate amount of *income/incomes referred to in column 18 computed in accordance with the provisions of the Income-tax Act, 1961, for the previous year ending on 31.03.2026 relevant to the assessment year 2026-27 will be nil. *I/We also declare that *my/our *income/ incomes referred to in column 16 *and the aggregate amount of *income/incomes referred to in column 18 for the previous year ending on 31.03.2026 relevant to the assessment year 2026-27 will not exceed the maximum amount which is not chargeable to income-tax.

Place:.....

Signature of the Declarant⁹

Date:.....

PART II

[To be filled by the person responsible for paying the income referred to in column 16 of Part I]

1. Name of Assessee (Declarant) SUNDARAM MUTUAL FUND		2. Unique Identification No. ¹¹	
3. PAN of the person responsible for paying AAATS2554B	4. Complete Address Corporate Office: Sundaram Towers,I & II Floor, No. 46, Whites Road, Chennai - 600 014.	5. TAN of the person responsible for paying CHES06353E	
6. Email	7. Telephone No. (with STD Code) and Mobile No.	8. Amount of income paid ¹²	
9. Date on which Declaration is received (DD/MM/YYYY)		10. Date on which the income has been paid/credited (DD/MM/YYYY)	

Place:.....

.....

Date:.....

Signature of the person responsible for paying the income referred to in column 16 of Part I

NOTES (For Filling Form 15G)

**Delete whichever is not applicable.*

- 1

As per provisions of section 206AA(2), the declaration under section 197A(1) or 197A(1A) shall be invalid if the declarant fails to furnish his valid Permanent Account Number (PAN).
- 2

Declaration can be furnished by an individual under section 197A(1) and a person (other than a company or a firm) under section 197A(1A).
- 3

The financial year to which the income pertains.
- 4

Please mention the residential status as per the provisions of section 6 of the Income-tax Act, 1961.
- 5

Please mention “Yes” if assessed to tax under the provisions of Income-tax Act, 1961 for any of the assessment year out of six assessment years preceding the year in which the declaration is filed.
- 6

Please mention the amount of estimated total income of the previous year for which the declaration is filed including the amount of income for which this declaration is made.
- 7

In case any declaration(s) in Form No. 15G is filed before filing this declaration during the previous year, mention the total number of such Form No. 15G filed along with the aggregate amount of income for which said declaration(s) have been filed.
- 8

Mention the distinctive number of folio details maintained with Sundaram Mutual Fund.
- 9

Indicate the capacity in which the declaration is furnished on behalf of a HUF, AOP, etc.
- 10

Before signing the declaration/verification, the declarant should satisfy himself that the information furnished in this form is true, correct and complete in all respects. Any person making a false statement in the declaration shall be liable to prosecution under section 277 of the Income-tax Act, 1961 and on conviction be punishable-

(i)

in a case where tax sought to be evaded exceeds twenty-five lakh rupees, with rigorous imprisonment which shall not be less than six months but which may extend to seven years and with fine;

(ii)

in any other case, with rigorous imprisonment which shall not be less than three months but which may extend to two years and with fine.
- 11

The person responsible for paying the income referred to in column 16 of Part I shall allot a unique identification number to all the Form No. 15G received by him during a quarter of the financial year and report this reference number along with the particulars prescribed in rule 31A(4)(vii) of the Income-tax Rules, 1962 in the TDS statement furnished for the same quarter. In case the person has also received Form No. 15H during the same quarter, please allot separate series of serial number for Form No. 15G and Form No. 15H.
- 12

The person responsible for paying the income referred to in column 16 of Part I shall not accept the declaration where the amount of income of the nature referred to in sub-section (1) or sub-section (1A) of section 197A or the aggregate of the amounts of such income credited or paid or likely to be credited or paid during the previous year in which such income is to be included exceeds the maximum amount which is not chargeable to tax. For deciding the eligibility, he is required to verify income or the aggregate amount of incomes, as the case may be, reported by the declarant in columns 16 and 18.

FOR THE KIND ATTENTION OF INVESTORS

Incomplete forms are not accepted by the Income Tax authorities and therefore, could result in deduction of tax at source. Please therefore, submit the form completed in all respects.

1.

Income Tax, where applicable, will be deducted at source in accordance with the Income Tax Act, 1961, as amended to date. Deduction of income tax at source for the current financial year will be made where the dividend is paid / credited. Under the existing tax provisions the rate of deduction is 10%.
2.

It may be noted that exemption from tax deduction will be granted only from the date of receipt of Form 15G and any tax deducted and remitted to the government before that date cannot be refunded under any circumstances.
3.

Form 15G is a self declaratory form and does not require attestation by a Govt. / Bank Official. For the investments held in the name of a Minor, the declaration should be signed by the Guardian.
4.

Before returning the forms, investors are requested to ensure that all the columns are duly filled up and that the signatures have been affixed in the places marked
5.

In case you have more than one Folio with us, all the Folio Nos. should be quoted in one form.
6.

The amount of income Tax deducted at source is remitted to the credit of Central Government before the 7th day of the following month. Any claim for refund, will have to be made by the depositor to the Income-tax authorities by filing a Return.
7.

Under the provisions of Section 206AA, quoting of Permanent Account Number (PAN) in the declaration form 15G/H in Clause No.2 is mandatory for non-deduction of Tax at Source. If PAN is not quoted in the declaration form, the form would be invalid and tax will be deducted.